

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT
POLICY

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Greece

Food Service - Hotel Restaurant Institutional

2011

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Report Highlights:

This report gives an overview of the Greek foodservice industry and its sectors. It also outlines current market trends and identifies best product prospects.

Post:
Rome

SECTION I. MARKET SUMMARY

1.1 Greek Economy Overview

With a population of approximately 11 million, and a Gross Domestic Product (GDP) of about \$305 billion, Greece is a relatively small country. Greece adopted the Euro as its new common currency in January 2002. Greece has a capitalist economy with the public sector accounting for about 40 percent of GDP and with per capita GDP about two-thirds that of the leading euro-zone economies. The Greek economy grew by nearly 4 percent per year between 2003 and 2007, due partly to infrastructural spending related to the 2004 Athens Olympic Games, and in part to an increased availability of credit, which has sustained record levels of consumer spending.

However, the economy went into recession in 2009 because of the world financial crisis, tightening credit conditions and Athens' failure to address a growing budget deficit triggered by falling state revenues and increased government expenditures. The economy contracted by 2 percent in 2009 and 4.8 percent in 2010. Greece violated the EU's Growth and Stability Pact budget deficit criterion of no more than 3 percent of GDP from 2001 to 2006, but finally met that criterion in 2007-08, before exceeding it again in 2009, with the deficit reaching 15.4 percent of GDP and 10.6 percent in 2010. In response to Greece's fiscal crisis, the government passed two austerity programs designed to cut the budget deficit to 7.6 percent of GDP by the end of 2011. These included a hike in the top rate of the VAT, an increase in excise taxes and a steep cut in the pay of civil servants. Pension reforms also included a limit on early retirement, an increase in the retirement age to 65 for both men and women and an index linking benefits to prices.

By May 2011, it appeared highly likely that the original deficit target of 7.6 percent in 2011 would not be met. In an effort to plug a newly emerging deficit shortfall of €2 billion, the government agreed in September 2011 to levy an emergency tax on private property in 2011 and 2012. To appease its creditors, the government prepared a new economic-recovery program, including asset sales and spending cuts of €76 billion. In the evening of Tuesday, 6 December, Greece issued austerity measure for 2012 in order to display the government's commitment to meet its public spending with regard to its foreign creditors, the European Union (EU) and the International Monetary Fund (IMF). The 2012 budget foresees a fourth year of recession with the economy contracting by 2.8 percent. It also projects a primary surplus of 1 percent of gross domestic product (excluding interest payment on debt). The 2012 budget will cut wages, increase taxes, and lay off thousands of civil servants and is expected to reduce public deficit to 9 percent of GDP in 2011. The new coalition government set up on 11 November by Lucas Papademos will pledge to introduce the second Greek bailout (decided upon in October

2011), which will provide the country with a second loan of some €130 billion by 2014. Greece's long-term goal is to cut the government deficit to less than 3 percent of GDP by 2014 and bring it down to 1 percent by the end of 2015.

1.2 Structure of the Economy

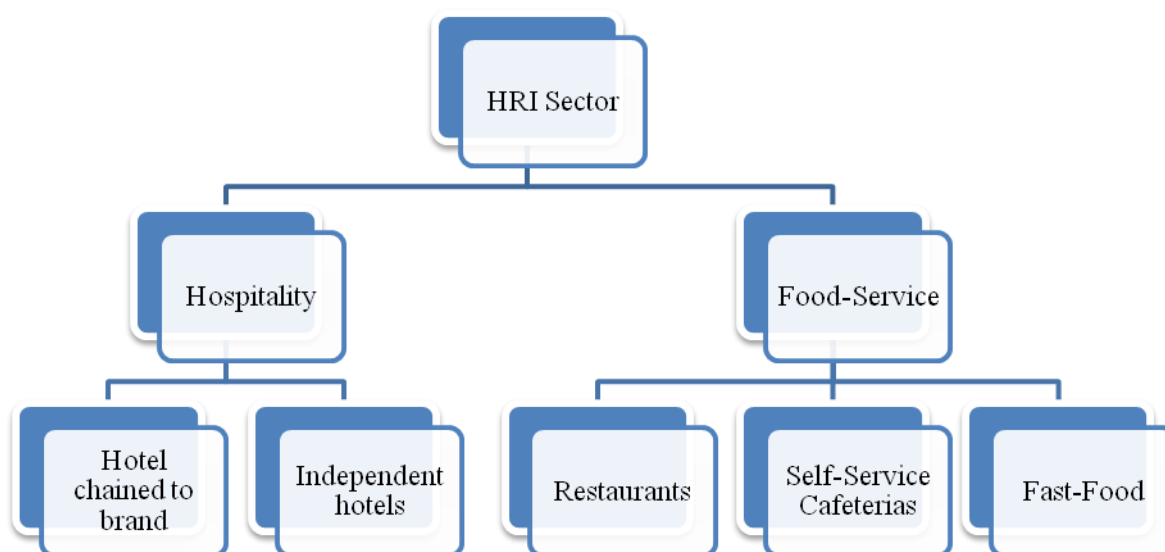
Greece has a predominately service economy, which accounts for over 78 percent of GDP. Tourism provides 15 percent of GDP. Immigrants make up nearly one-fifth of the work force, mainly in agricultural and unskilled jobs. Almost 9 percent of the world's commercial shipping is Greek-owned, making the Greek commercial fleet the largest in the world. Other important sectors include food processing, tobacco, textiles, chemicals (including refineries), pharmaceuticals, cement, glass, telecommunication, and transport equipment. Agricultural output has steadily decreased in importance over the last decade, accounting now for only 5 percent of total GDP compared to a 17 percent in the early 1990's.

1.3 The Greek Hotel and Food Service Industry

The Greek Hotel and Food Service Industry comprises principally over 9,700 hotels and more than 115,000 among restaurants, cafeterias, bars, and entertainment centers. Seasonality is a key characteristic of the sector. Employment in the HRI industry is estimated at 640,000 (about 13 percent of the total labor force), of which 38 percent are women and 44 percent under the age of 30.

Although the HRI sector is one of the major sources of income for Greece, the economic crisis is severely affecting the profitability of both hotels and food-service outlets.

Figure 1: The Greek HRI Sector



Source: Euromonitor

1.3.1 The Greek Hotel Industry

The largest players in the Greek hotel industry are local franchise holders for international brands, such as Ionian Hotel Enterprises, Lampsa Hellenic Hotels, and Regency Entertainment. Lampsa Hellenic Hotels owns and operates the luxury Grande Bretagne Hotel in Athens. Regency Entertainment, formerly known as Hyatt Regency Hotels and Tourism (Hellas), remains the most profitable hotel chain in Greece, owning and operating the only Hyatt-managed hotel in the country, the five-star Hyatt Regency Thessaloniki. Another significant players are Daskalantonakis Group-Grecotel and Astir Palace Vouliagmenis.

During the last months, the Greek hospitality sector suffered from weak domestic tourism. According to Eurostat, there were 62.7mn nights spent in hotels in Greece in 2010, of which 16.4mn were by Greek residents and 46.3mn by foreign residents. This represented an annual decline of 2.3 percent in total nights, which was largely the result of weak demand by Greek residents (-10.8 percent), while demand by foreign tourists grew 0.8 percent. The biggest percentage decline in the number of nights during the year was recorded in the period January-April (-5.6 percent), followed by September-December (-2 percent) and May-August (-1.8 percent).

According to the Association of Athens-Attica Hoteliers, hotels in the Athens region recorded relatively low occupancy rates of 61 percent in the period January-October 2010. They also reported an 11 percent decline in revenues and a 4.4 percent fall in room occupancy rates in the month of October, compared with the same month in 2009. During the traditional high season in July and August, both three-and four-star hotels also reported

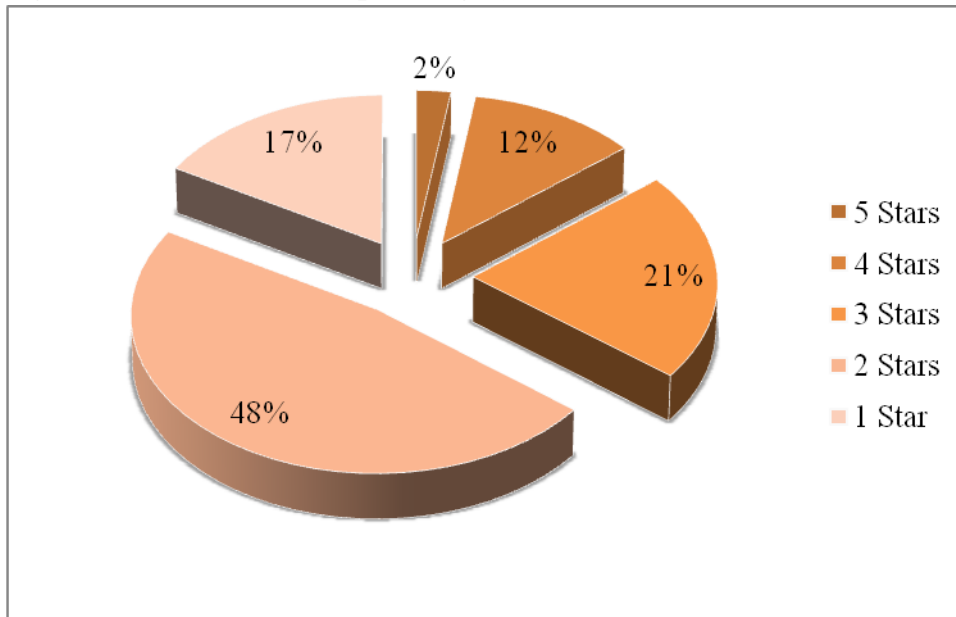
sharp declines in revenue per available room. Recent data for November show a severe decline in occupancy rates, particularly in four-and five-star hotels (down some 11 percent and 17 percent respectively).

Table 2: Hotels categories in Greece

	5 Stars	4 Stars	3 Stars	2 Stars	1 Star	All Hotels
Number of Hotels	230	1,132	2,097	4,629	1,617	9,705
Total Number of Rooms	39,614	101,101	93,400	138,103	30,749	402,967
Total Number of Beds	78,464	191,966	176,395	253,386	58,152	758,363
Average Number of Rooms	172	89	45	30	19	42
Average Number of Beds	341	170	84	55	36	78

Source: Koutoulas Hotel Database 2009

Figure 3: Number of Hotels per category in Greece



Source: Koutoulas Hotel Database 2009

Table 4: The 20 largest hotel brands in Greece

Rank	Brand	Number of Hotels	Number of Rooms	Type of Brand
1	Mitsis Hotel	16	4,787	National
2	Grecootel (TUI, N. Daskalantonakis Group)	19	4,473	National
3	Iberostar	12	3,377	International
4	Club alltoura (Alltours)	10	3,206	International
5	Louis Hotels	10	2,831	Cypriot
6	Atlantica Hotels (TUI)	11	2,634	Cypriot
7	Aldemar Hotels & Spa	8	2,450	National
8	Aquis Hotels & Resorts	8	2,235	National
9	Kipriotis Hotels	5	1,706	Local
10	Classical Hotels (N. Daskalantonakis Group)	11	1,569	National
11	Helios Hotels & Resorts	7	1,566	National
12	Esperia Hotel Group	6	1,563	Local
13	G-Hotels	5	1,521	Local
14	Divani Collection	7	1,464	National
15	Best Western	22	1,367	International
16	Mareblue Hotels & Resorts	5	1,300	National
17	Chandris Hotels & Resorts	5	1,253	National
18	Aegean Star Hotels	5	1,237	National
19	Capsis Hotels & Resorts	2	1,156	National
20	Star Hotels	5	1,122	National
	TOTAL	169	40,002	National

Source: Koutoulas Hotel Database 2009

1.3.2 The Greek Food Service Industry

The economic crisis in Greece is hitting consumer spending. With rising unemployment rates—which currently stand at about 16 percent—and price rises after two VAT increases last year, the spending power of Greek consumers has been reduced significantly. Consumers reduced their expenses in consumer foodservice, especially on products that were over-priced, with full-service restaurants having the worst growth rates in 2010, despite efforts made via discounts and offers.

As the economy shrank in Greece, operating costs continued to rise, profits fell sharply, and competition was very strong. In this climate, thousands of outlets closed down or relocated, while businesses also limited operating costs by cutting down on personnel, changing their suppliers, or reducing operating hours and days.

Examples of businesses that closed down or reduced their networks due to increasing losses were numerous during 2010, and were in all formats: independent, small or large chains, domestic or multinational. Noteworthy examples include multinational giants like McDonald's, that re-evaluated and downsized its network since 2007,

moving from 49 outlets in 2007 to 30 outlets in 2010; and Starbucks, which reduced its network from 74 outlets in 2008 to 60 in 2010. The impact was noticeable in well-established leading domestic chains like Goody's in burger fast food. Goody's relocated and renovated outlets since 2008 in order to maintain high sales, but still did not manage to retain its full network size and saw it shrink in 2010.

Full-service restaurants are those that most suffered from the reduction of consumers' disposable income. In 2010 sales dropped by 19 percent and the number of outlets by 6 percent. However, Asian restaurants value grew 17 percent at the same time, thanks to cheaper service and food.

Lower-cost channels such as street-stalls/kiosks and self-service cafeterias that are normally rent-free establishments within a large retailing operation, e.g. IKEA, performed better.

Table 5: Full-Service Restaurants in Greece (EUR mln)

Full-Service Restaurants	2005	2006	2007	2008	2009	2010
Chained Full-Service Restaurants	153.2	181.4	199.2	209	206.5	194.4
Independent Full-Service Restaurants	5,160.50	5,256.80	5,381.90	4,865.10	4,119.90	3,314.90
Asian Full-Service Restaurants	18.3	24	30.2	33.2	33.7	31.8
European Full-Service Restaurants	4,278.20	4,370.80	4,493.00	4,013.90	3,389.20	2,695.30
Latin American Full-Service Restaurants	27.9	31.4	38.5	41.1	34.9	30.3
Middle Eastern Full-Service Restaurants	21.9	24.1	26.9	27.6	25.3	22.8
North American Full-Service Restaurants	42.9	62.3	71.1	75.7	76.9	73.1
Pizza Full-Service Restaurants	772.7	769.9	765.6	717.5	616.8	523.4
Other Full-Service Restaurants	151.9	155.7	155.8	165.1	149.6	132.6
Casual Dining Full-Service Restaurants	106.1	131.5	146.9	159	159.3	152.8
Full-Service Restaurants	5,313.70	5,438.20	5,581.00	5,074.10	4,326.40	3,509.30

Source: Euromonitor 2011

Table 6: Brand Shares of chained Full-Service Restaurant (% value)

Chained Full-Service Restaurants	Global Brand Owner	2007	2008	2009	2010
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Pizza Hut	Food Plus AEBE	20.4	20.6	20.1	19.7
Pizza Roma	Pizza Roma S.A.	17.1	15.6	14.9	14.2
TGI Friday's	Carlson Cos Inc.	8.8	9.5	11.3	12.1
La Pasteria	Everest S.A.	10.8	10.6	9.9	10.5
Palmie Bistro	Palmie S.A.	9.1	10.2	10.5	10.4
Noodle Bar	Athanasios Malliaros	5.6	6	6.3	6.8
Applebee's Neighborhood Grill & Bar	Milomel Hellas S.A.	6.4	5.6	4.6	4.5
Friday's Bar & Café	Carlson Cos Inc.	4.4	4	4.3	4.3
Far East Pack	Framar S.A.	1	1.3	1.6	2
Ruby Tuesday	P&D Ltd.	3.1	2.9	2.3	1.8
Hard Rock Café	Hard Rock Café Hellas S.A.	1.5	1.3	1.2	1.1
Gourmet Burger Kitchen	GBK Athens S.A.	-	-	0.3	0.9
Wagamama	Positive Eating Restaurants S.A.	-	0.3	0.8	0.9
Bennigan's	Crown Resorts Group	0.5	0.7	0.8	0.8
Hooters	Food & Fun Ltd.	1	1	0.9	0.8
Yum Yum	Yum Yum Ltd.	-	0.1	0.5	0.5
Block House	Block House Hellas	0.5	0.5	0.4	0.3
Others	Others	9.9	9.6	9.3	8.6
Total	Total	100	100	100	100

Source: Euromonitor 2011

Self-Service Cafeterias

The economic downturn in Greece has encouraged cheaper outlets. Self-service cafeterias had a positive 4 percent value growth in 2010 and the number of outlets rose by 6 percent in the same period.

Table 7: Self-Service Cafeterias in Greece (EUR mln)

Outlets	2005	2006	2007	2008	2009	2010
Chained Self-Service Cafeterias	6.1	6.5	8.9	12.5	16.1	17.2
Independent Self-Service Cafeterias	2.2	2.3	2.6	3.0	3.3	3.0
Total	8.3	8.8	11.5	15.5	19.4	20.2

Source: Euromonitor 2011

Table 8: Brand Shares of chained Self-Service cafeterias (% value)

Global Brand Owner		2007	2008	2009	2010
IKEA	Housemarket S.A.	32.2	32.6	33.1	36.2
Hondos Center	Hondos Bros	31.4	25.4	26.2	28.6
Public	Publicworld S.A.	12.0	20.5	20.2	17.5
Others	Others	24.4	21.5	20.5	17.6
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor 2011

Franchising

Franchising is prevalent in the Greek consumer foodservice industry. In 2010, due to the economic recession, franchising operations slowed down substantially, while many franchised outlets closed down. Franchising in Greece works via the traditional model of a master franchisor and the franchisees, either in domestic or international brands. Multinational brand owners normally provide the master franchising license to local companies and let them decide the franchising format and development. There are cases of joint ventures and/or subsidiaries of international brand owners that operate chains of outlets in a centrally managed administration where all outlets are company-owned. Examples are Marinopoulos Kafe S.A. operating Starbucks in Greece, or Milomel Hellas S.A. operating Applebee's Neighborhood Grill & Bar.

More than two thirds of the total chained outlets in Greece in 2010 are operated by franchisees (i.e., Gregory's Microgevmata, Coffeeright, Everest, Goody's, Dodoni, and Pizza Roma). Operating companies normally manage key positioned flagship stores in order to secure the brand's proper development and correct marketing. Franchising is a popular method of development for foreign operators entering Greece, however local players also franchise widely.

Fast-Food

Consumers' interest in fast-food declined in 2010, mainly due to a lower disposable income. The entries of Asian fast food and Middle Eastern fast food have largely contributed to the decline of profitability of incumbent fast-

food outlets. The current value of fast-food sector remains high (€ 1.4 billion in 2010), but with an 8 percent contraction from previous year. The number of outlets declined by 3 percent.

Goody's is perhaps the most popular fast-food chain in the country. A more recent chain is Everest that specializes in hand-held snacks. Flocafé is gaining popularity through its coffee and dessert items. There are also many independently owned fast food businesses that offer typical fast food items, such as gyros. Many of these small businesses tend to be open late at night and are popular with younger crowds on their way home from a night out.

Table 9: Fast-Food in Greece by category (EUR mln)

Fast-Food	2005	2006	2007	2008	2009	2010
Chained Fast Food	527.4	521.1	558.6	575.9	584	562.7
Independent Fast Food	883.7	906.4	921.8	969.6	934.1	841.1
Asian Fast Food	1.9	0.3	-	-	1.5	2.7
Bakery Products Fast Food	493.1	507.9	542.1	566.4	550.6	489.2
Burger Fast Food	274.1	265.5	273.7	283	289.2	283.2
Chicken Fast Food	3.8	3.5	3.3	3.5	3.7	4.6
Ice Cream Fast Food	44.3	45.2	46.2	45.8	45.1	41
Middle Eastern Fast Food	-	-	-	-	1.3	2.3
Pizza Fast Food	22.5	23.8	24.1	24	25.1	24.6
Other Fast Food	571.4	581.4	591	622.8	601.7	556
Fast Casual Dining	11.9	12.7	16.4	23.6	31.1	30.1
Total	1,411.10	1,427.50	1,480.30	1,545.50	1,518.10	1,403.80

Source: Euromonitor 2011

Table 10: Brand Shares of Chained Fast-Food in Greece (% value)

Chained Fast-Food	Global Brand Owner	2007	2008	2009	2010
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Goody's	Goody's S.A.	36.7	36.4	35.8	36.3
Everest	Everest S.A.	16.5	16.2	16.1	15.9
Gregory's	Gregory's Microgevmata S.A.	9.6	9.4	10.1	10
McDonald's	McDonald's Hellas	7.2	7	7	7.4
Everest Olympic Catering	Everest S.A.	4	4.2	4.1	4.3
Dodoni	Dodoni Ice Creams S.A.	4.3	3.7	3.2	3
Pitta tou Pappou	Pitta tou Pappou Ltd.	-	2.6	2.7	2.5
Simply Burgers	AVK Restaurants S.A.	0.8	1.4	2.4	2.4
Zio Peppe Pizza Al Metro	Theodoropoulou K and Sia OE	1.5	1.5	1.7	1.9
Sbarro	Select Service Partner Restaurants Hellas S.A.	2.1	1.9	1.9	1.8

Source: Euromonitor 2011

Specialist coffee shops

The popularity of espresso-style coffee is increasing in line with the rise of U.S coffee-shop-style cafés. Local operators Grogoris and Flocafé compete with Starbucks, which entered the market in 2002 and now has 60 outlets.

Specialist coffee shops represent one of the most dynamic foodservice categories in the Greek market. This expanding sector met consumers' demands for steady quality and variety in coffee drinks, coupled with convenient location and pleasant environment.

Specialist coffee shops, self-service cafeterias, fast food outlets, and casual dining full-service restaurants have benefited from the change of scenery in the retail sector, with major shopping centers opening in metropolitan Athens, the prefecture of Thessaloniki and in other major cities and touristic locations (Crete, Rhodes, and Corfu).

1.3.3 Tourism

Greece ranks in the top 15 destinations worldwide and tourism represents 15 percent of the country's GDP. Under the current economic circumstances, foreign investment inflows are slowing down. Domestic tourism has been badly hit by the Greek recession during 2009 and 2010. This was largely due to the considerable scale of the economic downturn in the Eurozone and the UK, both leading contributors to visitor numbers to Greece. According to the Hellenic Statistical Authority (HSA), the number of non-resident arrivals from abroad fell by 6.4 percent in 2009. Greece's Institute of Tourist Research and Forecasts (ITEP) also reported that in the early part of 2010, convention and business tourism in Athens and Thessaloniki were badly affected by the global economic downturn. In an attempt to stimulate the tourism sector, the government introduced various measures at the end of 2009, including a freeze on debt obligations until July 2010 for all forms of tourism businesses, including marine tourism.

Greece has more than 15,000 kilometers of coastline, 190,000 beaches, and 6,000 islands and islets. The numerous forms of tourism, such as congress, marine, cultural, gastronomic, ecological, and health spa are the pillars for the development of Greece's tourist product. Following the 2004 Olympics in Athens, Greece has been increasingly viewed as a popular world destination for corporate events and conferences. Athens is the main beneficiary, but Thessaloniki, Rhodes, Crete, Kos, and Corfu are attracting business. Increasingly, however, significant numbers of visitors from Eastern Europe and China made Greece their preferred destination, creating a wider base of origin countries and new demands for services, facilities, and attractions.

Gambling

One of the key drivers of tourism in Greece is the gambling industry. Greeks spend an estimated EUR1.7bn a year at casinos that can be found in Rhodes, Syros, Patra, and Xanthi. Regency Entertainment—that has stakes in the refurbished Regency Casino Mont Parnes in Athens and the Regency Casino Thessaloniki—runs the most prominent resorts.

SECTION II. ROAD MAP FOR MARKET ENTRY

A. Entry Strategy

As a member of the EU, the Common Agricultural Policy (CAP) governs Greece's agricultural sector. Similarly, Greece employs the same tariffs and border measures as the other EU member states. Products imported into Greece must meet all Greek and EU food safety and quality standards, as well as labeling and packaging regulations. It is important to work with experienced importers, and/or have an agent to work with Greek regulatory authorities to ensure the acceptability of specific products. Personal relationships and language ability are of value when conducting business transactions. It is also advisable for the agent to contact health authorities at the port of entry as interpretation of health directives may vary from port to port. For more information on Product Trade Restrictions, Food Standards and Regulations, please refer to Post's FAIRS GAIN Report GR1107.

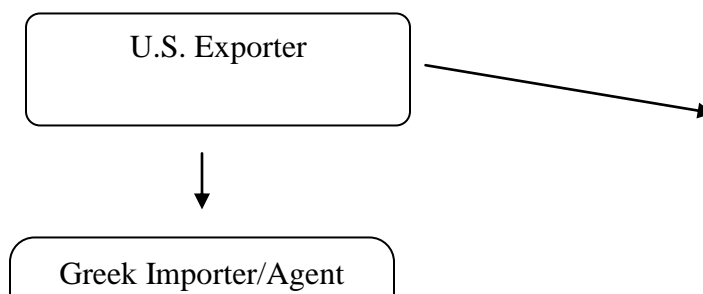
The agents usually undertake promotional campaigns for the import products they service. Several large organizations in the food service sector, including hotel and fast food chains, either import directly or have their own supply unit. U.S. exporters need to work closely with the industry, focusing on the importers and distributors who can best promote U.S. products to the Greek HRI sector.

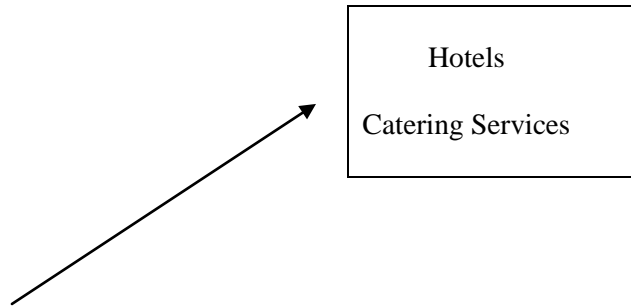
Greece has specific and sometimes traditional consumption patterns. Careful planning is required for market entry strategies since the industry is highly competitive, and there are sometimes many categories within a single market segment. The following should be taken into consideration:

- Competitor analysis
- Segmentation and identification of a specific target market
- Advertising and promotional activities
- Retail price
- Packaging (label in Greek is an important element)
- Distribution channel
- Product itself (complying with the tastes of Greek people)

When choosing and deciding on a distribution partner or an agent, it is good to explain the profile and positioning of the product, since they can guide U.S. traders through the Greek market and give them the correct advice for marketing the product.

B. Market Structure





- An importer or agent, who may also be a wholesaler and/or distributor, usually imports food products. Big hotel chains and catering services have their own central buying departments and act as importers too.
- Most of the distributors have nationwide distribution channels.
- “Cash and Carries” sell to retailers and restaurants at more competitive prices. METRO S.A., with 24 outlets, is the major “Cash and Carry” in Greece.
- The wholesalers/distributors buy from the local processing industry in addition to importing

Advantages and Challenges for U.S. Exporters in Greece

Advantages	Challenges
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Greece is a member of the Euro zone, which eases market entry.	U.S. exporters must conform to often-difficult Greek/European standards and regulations.
Greece is an import dependent country.	The Greek Ministry of Agriculture is dominated by anti-import thinking. Frequently, GOG impose non-tariff barrier measures to prevent imports of Ag Products in support of domestic production.
Establishing a representative office in Greece is often less costly than in other EU markets.	Establishing a representative office in Greece can be a time-consuming and bureaucratic endeavor.
Tourism provides a seasonal boost to retail and food and drink sales.	Social disturbances have damaged Greece's reputation as a tourist destination and have hit consumer confidence.

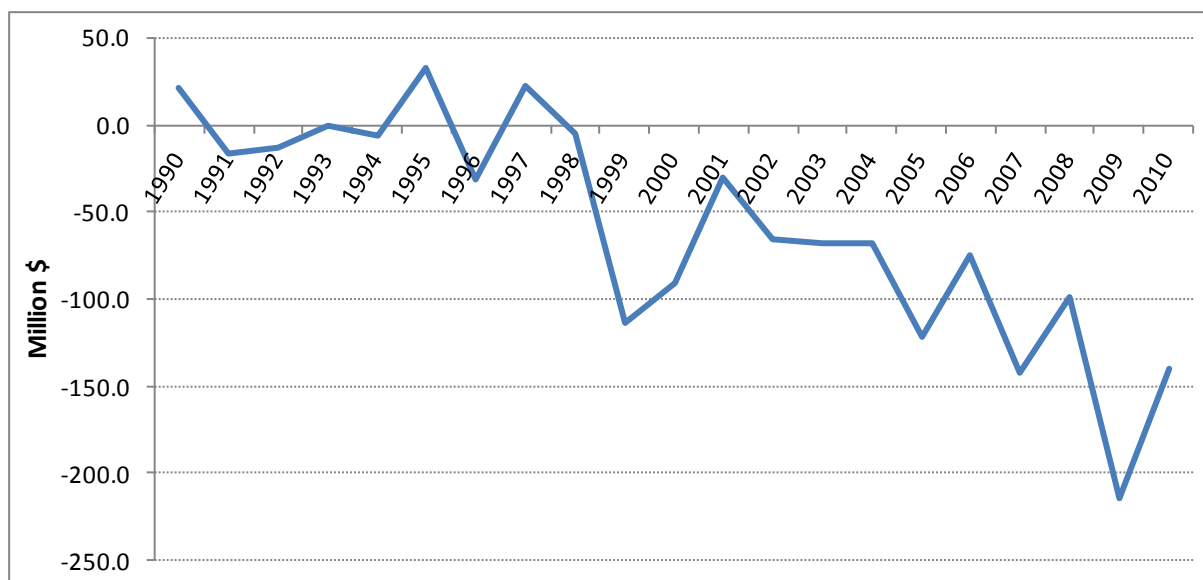
SECTION III. COMPETITION

Greece's main competitor is the European Union. Netherlands, Germany, France, and Italy are the leading country suppliers in the food and agricultural trade. The leading importers of Greece's goods are Italy, Germany, Turkey, Bulgaria, and United Kingdom. Greek primary agricultural imports include cheese, beef, wheat, pork, and sugar. Olives dominate Greece's food exports, followed by canned peaches, cotton, olive oil, and cheese. In 2010, tree nuts and soybeans were the leading U.S. agricultural exports to Greece, while processed fruits and vegetables, cheeses and olives were the leading Greek agricultural exports to the United States. Major processed food products exported include processed fish (frozen), prepared or preserved peaches, prepared and preserved vegetables, cheese and dairy products (mainly yogurt and the worldwide famous "feta"), olives, oil, and wine.

Bilateral Ag Trade 2010	
U.S. Ag Exports to Greece \$140 M	U.S. Ag Imports from Greece \$ 280M
- Tree Nuts: \$32 million	- Canned Olives: \$88 million
- Tobacco: \$22 million	- Cheese: \$20 million
- Soybeans: \$20 million	- Canned Peaches: \$20 million

- The United States exports both Bulk and Consumer products to Greece.
- Greece exports mainly Consumer products to the United States.

U.S. Ag Trade Balance with Greece:



SECTION IV. BEST PRODUCT PROSPECTS

A. U.S. products in the Greek market that have good sales potential

- Frozen food
- Frozen and Salted Fish
- Tree Nuts
- Pulses

B. Products not present in significant quantities but which have good sales potential:

- Meat
- Wine
- Beer
- Juices and Soft Drinks
- Organic foods
- Dairy Products
- Chocolate, ice cream and confectionary
- Food ingredients
- Snack foods
- Readymade meals

C. Products not present because they face significant trade barriers:

- Turkey and Other Poultry products
- Beef meat and Products
- Processed food products containing biotech ingredients
- Low volume high value food ingredients

- Corn oil
- U.S. milling wheat

SECTION V. POST CONTACT AND FURTHER INFORMATION

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Jim Dever

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Key Greek Government Agencies and Associations

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General Chemical State Laboratory

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Website: http://www.gcsf.gr/index.asp?a_id=136

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Website: <http://www.e-oikonomia.gr>

**Payment and Control Agency for Guidance and Guarantee
Community Aid (OPEKEPE)**

241, Acharnon

GR-10446 Athens

Greece

Tel: +30 210 212 49 03

Fax: +30 867 0503

Website: <http://www.opekepe.gr>

Hellenic Export Promotion Organization (HEPO)

86-88, Marinou Antypa

163 46 Hellioupolis Athens

Greece

Tel.: +30 210 9982100

Fax: +30 210 9969100

Website: www.hepo.gr

E-mail: infocenter@hepo.gr

Pan-Hellenic Confederation of Unions of Agriculture Cooperatives (PASEGES)

26, Arkadias

11526, Athens

Greece

Tel: +30 2107499425 – 0030 2107499445

Fax: +30 2107779313

E-mail: info@paseges.gr ; papadopoulou@paseges.gr

Website: www.paseges.gr

Hellenic American Chamber of Tourism (HACT)

17280 Newphone street suite 18

Fountain Valley California 92708 USA

Tel: 646-485-1086

Fax: 714-641-0303

E-mail: chamberoftourism@aol.com

Website: <http://www.hact.us>

American Society of Travel Agents Association (ASTA)

c/o Dr. Paul Holevas

Cruise Club Holidays

85, Vouliagmenis Avenue

16674 Athens

Greece

Tel: +30 210 9604250

Fax: +30 210 9644943

E-mail: sales@cruiseclub.gr

Website: <http://www.travelling.gr/asta>

<http://www.cruiseclub.gr>

GUATA - Greek Union of Air Travel Agencies (PETAGA)

20, Petraki Street

105 63 Athens

Greece

Tel: +30 210 3255370

Fax: +30 210 3237703

Hellenic Association of Airline Representatives / HAAR

65b, Vouliagmenis

166 74 Glifada

Greece

Tel: +30 210 9600942 /3

Fax: +30 210 9600941

E-mail: discover-ath@travelling.gr

Website: <http://www.haar.gr/>

Hellenic Chamber of Hotels

24, Stadiou Street

105 64 Athens

Greece

Tel: +30 210 3237193

Fax: +30 210 3225449

E-mail: grhotels@otenet.gr

Website: <http://www.grhotels.gr/>

Hellenic Hotel Federation

24, Stadiou Street

105 64 Athens

Greece

Tel: +30 210 3312535; +30 210 3312536

Fax : +30 210 3230636

E-mail : info@hhf.gr

Website: <http://www.hhf.gr>

Hellenic Chef's Association

171, Vouliagmenis Avenue, Dafni 17237

Greece

Tel: +30 210 8251401

E-mail: info@chefclub.gr

Website: <http://www.chefclub.gr>

Chef's Club Thessaloniki Hellas

DETH (stand 15) Thessaloniki, 54636

Greece

Tel: +30 2310 291845

E-mail: info@chefclub.gr

Website: <http://www.chefclub.gr>

Chef's Club of Crete

10, Grammou Rd., Heraklion Crete, 71307

Greece

Tel: +30 2810 240889

E-mail: chefcret@otenet.gr

Website: <http://www.chefsofcrete.gr>

Chef's Club of Corfu

34A Markou Sofianou, Karteria Corfu 49100

Greece

Tel: +30 26610 81664

E-mail: info@chefscorfu.gr

Website: <http://www.chefscorfu.gr>

Panhellenic Federation of Catering and Tourist Industry Employees

65, Solomou Street

104 32 Athens

Greece

Tel: +30 210 5244516

+30 210 5234002

Fax: +30 210 5234002

Association of Greek Tourist Enterprises (SETE)

34, Amalias Avenue

105 58 Athens

Greece

Tel: +30 210 3217165

Fax: +30 210 3217177
E-mail: info@sete.gr
Website: <http://www.sete.gr/>

Hellenic Association of Travel and Tourist Agencies (HATTA)

11, Iossif Rogon Street
117 42 Athens
Greece
Tel: +30 210 9223522, 210 9234143
Fax: +30 210 9233307
E-mail: hatta@hatta.gr
Website: <http://www.hatta.gr>

Association of Tourist Guides of Thessaloniki

P.O. BOX 10163
541 10 Thessaloniki
Greece
Tel: +30 2310 546037
Fax: +30 21310 546037
E-mail: guideskg@otenet.gr

Panhellenic Federation of Tourist Enterprises (POET)

Syngrou 1 and Ath. Diakou 20
117 43 Athens
Greece
Tel: +30 210 9210720, 210 9245120, 210 9245574
Fax: +30 210 9210740, 210 9245153
E-mail: info@poet.gr
Website: <http://www.poet.gr>

Panhellenic Guide Federation

45-47, Voulis Street
105 57 Athens
Greece
Tel: +30 210 3210680
Fax: +30 210 3210680
E-mail: admin@touristguides.gr
Website: <http://www.touristguides.gr>

Research Institute for Tourism (R.I.T.)

24 Stadiou Street
GR 105 64 Athens
Greece
Tel: +30 210-3312253
+30 210-3310022
Fax: +30 210-3312033
E-mail: itep@otenet.gr
Website: <http://www.itep.gr>

Hellenic Professional Yacht Owners Association

Marina Zeas, Administration Building

185 36 Piraeus

Greece

Tel: +30 210 4526335

Fax: +30 210 4280465

E-mail: hpyoa@yachtnet.gr

epest@yachtnet.gr

Website: <http://www.hpyoa.gr>

<http://www.epest.gr>

Hellenic Yacht Brokers and Consultants Association

Marina Zeas office A'1

185 36 Peiraias

Greece

Tel: +30 210 4533134

Fax: +30 210 4533134

E-mail: hyba@ath.forthnet.gr

Website: <http://www.hyba.gr>

Trade Events in 2011**HO.RE.CA 2011**

6th Hotel – Restaurant – Cafe Exhibition

Date: February 3-6, 2011

The Tourist Industry moves toward a new period, which is primarily determined by the world's financial crisis. The tourist product upgrade, as well as the quality-price relation is considered to be the only way road for the Greek heavy industry. The goal of the 6th HO.RE.CA. 2011 is to become an important commercial forum, as well as to offer an optimistic point of view against this difficult financial period.

Venue: Expo Athens

Organizer: Forum S.A.

Tel.: +(30)-(210)-5242100; +(30)-(210)-5200328

Fax: +(30)-(210)-5246581

E-mail: info@forumsa.gr

Website: <http://www.forumsa.gr>

IFDTEX 2011

24th International Food, Drink, and Technology Exhibition

Date: February 11-14, 2011

The International Food and Drinks Exhibition is the leading part of this technology forum. It showcases all kinds of food processing and packaging machines, materials, systems, and products under one roof. This is a unique opportunity to meet senior buyers and decision makers from all facets of the user industry.

Venue: Metropolitan Expo, Athens

Organizer: Mack Brooks Hellas A.E.

Tel.: +(30)-(210)-6564411

Fax: +(30)-(210)-6564410

E-mail: info@mackbrookshellas.gr

Website: <http://www.mackbrookshellas.gr>

11th Thessaloniki International Wine Competition

Date: March 8-10, 2011

The only International Wine Competition held in Greece. Every March, the O.I.V. (International Organization of Vine and Wine) organizes the competition, where Greek and foreign wine tasters (enologists, sommeliers, and journalists) taste wines from Greece and abroad for three days. The public has the opportunity to taste the award-winning wines at a wine tasting event that is held every year after the end of the competition while winners receive the awards at an official awards ceremony.

Venue: Thessaloniki International Exhibition Centre

Organizer: Wine Producers Association of the Northern Greece Vineyard - HELEXPO

Tel.: +(30)-(2310)-281617; +(30)-(2310)-281632

Fax: +(30)-(2310)-281619

E-mail: info@wineroads.gr

Website: <http://www.wineroads.gr/>

DETROP

21st International Exhibition of Food, Beverages, Machinery, Equipment

Date: March 11-14, 2011

DETROP is the first quality and food and beverages show in Thessaloniki. DETROP is exclusively dedicated to the suppliers, distributors, manufacturers, retailers, and small-scale producers of food and beverage products to meet the needs of the rising demands of the food service and hospitality industry.

Venue: Thessaloniki International Exhibition Centre, Thessaloniki, Greece

Organizer: HELEXPO

Tel.: +(30)-(2310)-291201

Fax: +(30)-(2310)-291658

Email: detrop@helexpo.gr

OENOS

3rd International Wine Fair

Date: March 11-14, 2011

Oenos is an international wine fair that offers a wide range of products from the Agriculture and Wine Industry.

Venue: Thessaloniki International Exhibition Centre

Organizer: HELEXPO

Tel.: +(30)-(2310)-291201

Fax: +(30)-(2310)-291658

Email: detrop@helexpo.gr

Website: <http://www.helexpo.gr>

PHILOXENIA 2011

27th International Tourism Exhibition

Date: November 18-20, 2011

PHILOXENIA Expo aims at introducing the variety of the touristic climate and develops the environment of tourism in the region in order to attract as much visitors and tourists as they can to visit the outstanding features of our country.

Venue: Thessaloniki International Exhibition Centre

Organizer: HELEXPO S.A.

Tel.: +(30)-(2310)-291293

Fax: +(30)-(2310)-291656

Email: philoxenia@helexpo.gr

Website: <http://www.helexpo.gr>

HOTELIA 2011

Date: November 18-20, 2011

HOTELIA is the definitive event for the restaurant, hotel, and motel industry. It is the essential showcase for hotel, leisure and related products, services, and technologies.

Venue: Thessaloniki International Exhibition Centre

Organizer: HELEXPO S.A.

Tel: +(30)-(2310)-291293

Fax: +(30)-(2310)-291656

Email: philoxenia@helexpo.gr

Website: <http://www.helexpo.gr>

XENIA 2011

42nd International Tourism and Hospitality Industry

Date: November 25-28, 2011

Related Industries: Catering and Hospitality Industries, Food Processing Industries, Tourism-Travel

Venue: Metropolitan Expo Exhibition Centre

Organizer: XENIA Exhibitions S.A.

Tel: +(30)-(210)- 8842916

Fax: +(30)-(210)-8216720

Email: info@xenia.gr

Website: <http://www.xenia.gr>